

## RFP FAQ

### **1.) Will you make your current pipeline available for our use?**

No. In the interest of confidentiality with current qualified leads and/or clients, the current pipeline will not be available for the selected contractors use. ESD, EDC, and its partners will collaborate with the contractor on the development of a target list, and these lists will be vetted for any duplicate clients, removing those that we do not wish the contractor to pursue.

### **2.) What Trade shows do you plan to attend?**

Although no trade shows are concretely decided upon, ESD, EDC, and its partners do plan on attending IAMC, SEMICON, and BIO. While the contractor is not expected to attend trade shows, appointments by the contractor should be set up possible qualified leads whenever possible if ESD, EDC, and its partners attend the same trade show.

### **3.) Are there target industries suitable for some areas of New York that are not included in the RFP? If so, what are they?**

No. The target industries outlined in the RFP are the only industries under consideration, as these industries have been vetted and approved.

### **4.) Does more than 7 qualified leads in one industry and less than 8 in another, but 56 qualified leads overall, comply with the contract terms?**

As some target industries may prove to be more difficult to produce qualified leads in than other targets, we do expect some variation. However, the contractor is expected achieve the goal of 7 qualified leads in each industry as best as possible.

### **5.) Will payment of invoiced amounts be paid within 30 days of receipt?**

Payment is expected to be within the normal course of business. Typically this would mean within 30 days, though special circumstances (ie; invoices not approved) may cause payment to take longer.

### **6.) Will any concurrent or subsequent working relationships with states contiguous to New York preclude the possibility of being selected for this project or jeopardize any potential contract with ESD?**

It is understood that contractors work with multiple states, and these working relationships will not preclude the possibility of being selected for this project. The RFP only requires that existing contracts with other states and the tasks associated with that contract be disclosed.

**7.) Under Section 2.2 Budget, please clarify: ..."cost of marketing activity, which shall represent direct marketing activities." Please cite specific examples: travel, lodging, attending Trade Shows, others?**

All costs associated with generating qualified leads must be included in the budget. The contractor's optional attendance and participation at trade shows and all related costs will be included in the total cost in the presented budget.

**8.) Under Section 3 #4: "Note: NYSEDC will not pay for Contractor relocation expenses." Please clarify: Is there a requirement that the Contractor live in NYS?**

There is no requirement that the contractor live in New York and no expectation for the hired contractor to relocate.

**9.) What is the annual budget for this effort?**

While the annual budget for this project is flexible, it will be primarily determined by the respondents of the RFP and the proposed budgets they bring forth.

**10.) Has NYSEDC and/or ESD engaged a contractor for lead generation before? If so, when and can you please give us a sense of the results? Also, if such a previous effort was discontinued, can you please explain why?**

The results of previous efforts are proprietary.

**11.) Are you open to considering other industries, such as telecom, call centers, distribution and warehouse, data centers, alternative energy (not necessarily renewable) etc?**

Renewable energy would include alternative energy. The other industries would not be considered unless they directly related to one of the 8 target industries outlined in the RFP (ie: a call center for life sciences).

**12.) Can you tell us what NYSEDC and ESD have been doing in recent years to attract investment in these industries? What's worked and what hasn't?**

EDC and ESD have used various advertising, marketing, and trade show methods in the past to attract business. The result of these efforts is propriety.

**13.) Is Upstate New York (areas north of Westchester County) a priority? If so, please explain.**

Upstate New York is a priority but it is not exclusive. Targets in the southern parts of New York would still be of interest.

**14.) Will preference be given to NYS-based firms? If so, how much?**

No preference will be given.

**15.) Page 4 Deliverables Minimum of 56 appointments/leads, or 7 appointments/leads per target sector and 2.1 (Bullet point) "Contractor will also assist with obtaining appointments at the major trade shows attended by firms from our target industry clusters" Questions:**

- a. Is trade show appointment setting activity in addition to the 56 appointment/lead goal?**
- b. If yes, how many events will need to be scheduled for targeted telephone outreach? What are the dates of the events planned for attendance by the NYSEDC and ESDC?**
- c. Is there an anticipated number of appointments expected to result from each trade show?**

The goal is simply to obtain 56 qualified leads. The method of obtaining these qualified leads is up to the discretion of the contractor. A contractor may choose to participate in a great number of trade shows or no trade shows at all. Either method is acceptable so long as the contractor is able to produce the overall performance goal of 56 qualified leads.

**16.) Pages 5 and Page 9 -- Fees and expenses (Page 5 2.4 /6) "Contractor must have the economic resources to pay expenses in advance of reimbursement" and Page 9 (3.1 /4) "Bidder shall include in his proposal the expenses associated with attending (admission fees, travel, etc.) the Trade Shows as noted in Section 2.1, but not the costs of exhibiting ...." Questions:**

**Is the suggested RFP scope indicating Bidders will include a response for both prospect identification, AND trade show appointment setting? Is the Bidder expected to be present at the trade show(s) as per Page 9 3.1 /4?**

The bidder should respond with how they will obtain the 56 qualified leads and the budget associated with their methods. Trade shows are not required as part of the bidders method.

**Would the role of the Bidder at a trade show be -as a prospector, or a support staff?**

If the bidder's methodology involves their attendance at trade shows, than that cost is at the bidder's expense and should be included in their budget. The hired contractor is not required to attend any trade shows if it is not congruent with their marketing approach.

**17.) Is the requirement of CRM software, as reflected in this section of the RFP, such that it is accessible by NYSEDC and ESD, or is this stipulation designed to ensure that the contractor has an effective, electronic means of tracking and extracting data as it pertains to the lead generation program?**

The software does not have to be specifically “CRM”. The contractor simply must have a reliable database system from which ESD, EDC, and its partners will be able to receive regular reports and relevant information.

**18.) Will both NYSEDC and ESD be willing to sign NDA’s prior to receipt of proposals, even when confidentiality statements are included in those proposals themselves? (This would include NDA’s from all ten participants in the review process, as well as “organizational” statements that each of the two “groups” will maintain the ideas covered by proprietary rights confidential and will not share or pursue those ideas with the winning contractor?)**

ESD, EDC, and its partners adhere to the prerogatives outlined in the RFP. “NYSEDC reserves the following prerogatives: To use any or all ideas submitted in the proposals received unless those ideas are covered by legal patent or proprietary rights.” ESD, and EDC cannot sign a Non Disclosure Agreement in regards to this proposal.

**19.) Is NYSEDC in a position to pursue a “retainer-based” payment structure, with pre-payments made on a quarterly basis? Is this payment structure one that NYSEDC can pursue?**

Payments made on a quarterly basis are an acceptable payment schedule. NYSEDC will not pre-pay, and will pay on a performance basis.

**20.) Can the mandatory experience required be satisfied by including similar work for industry trade associations (e.g. NY-BEST), government R&D organizations (e.g. NYSERDA) or business enterprises in your targeted industries?**

Yes, as long as the experience obtained developed leads for these organizations and the proposed methods for obtaining qualified leads is deemed acceptable by the review team.

**21.) What are ESD’s economic development revenue, employment or other growth targets for each of the 8 targeted industries?**

As stated in the RFP, ESD’s economic growth targets are 7 qualified leads with companies that have valid business interests for considering a project in New York, in each of the 8 highlighted industries. These leads should be substantial but ESD and NYSEDC do not choose to set specific goals as to the size of these leads at this time.

**22.) What industry market research does ESD have internally in each target area that will be shared with the winning vendor?**

While ESD will not share its current pipeline, please refer to the following link for industry data gathered by ESD:

<http://esd.ny.gov/NYSDataCenter/WhitePapers.html>

**23.) Do you expect the winning vendor to attend the meetings that result from lead generation that are set up with ESD, EDC, and their partners?**

There are no expectations for the contractor to attend meetings with ESD, EDC, and their partners. However, if attendance at these meetings is part of your program strategy, all costs associated with your attendance should be included in the proposed budget.

**24.) Does the proposal review team consist entirely of individuals from ESD? If not, who else does the proposal review team include?**

Proposals will be reviewed by a team consisting of ESD, EDC, and their partners.